

Beneficiary Nomination Letter

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, ZIP Code]

[Email Address]

[Phone Number]

[Investment Firm Name]

[Firm Address]

[City, State, ZIP Code]

Dear [Investment Firm Representative's Name],

I am writing to formally nominate beneficiaries for my investment account with your firm. Below are the details of my account and my designated beneficiaries:

Account Information

Account Number: [Your Account Number]

Beneficiary Details

1. Name: [Beneficiary Name 1]

Relationship: [Relationship to You]

Percentage: [Percentage %]

2. Name: [Beneficiary Name 2]

Relationship: [Relationship to You]

Percentage: [Percentage %]

In the event of my passing, I request that the above-mentioned individuals be considered as beneficiaries of my account, as specified.

Please let me know if any further documentation or information is required to process this request.

Thank you for your attention to this matter.

Sincerely,

[Your Signature (if sending a hard copy)]

[Your Printed Name]